

# The Process for Developing a Shared Vision for the University of Wisconsin Colleges and the University of Wisconsin-Extension

**A Briefing Paper for UW Colleges and UW-Extension Colleagues  
Prepared by Chancellor David Wilson**

**August 11, 2006**

## **INTRODUCTION**

As the University of Wisconsin Colleges and the University of Wisconsin-Extension engage in a historic journey together, it is important that we have a common vision of the destination ahead, so that we can move toward that goal in a unified manner.

As your chancellor, it is not my job to tell you what or where that destination may be. It is my job to provide leadership for a process that involves many voices and many minds in drafting that roadmap and identifying goal.

At this point in time, we have many efforts underway that will allow for that broad input and collaboration. Ultimately, we will craft a “shared vision,” consisting of broad statements that reflect our best thinking about the future of UW Colleges and UW-Extension.

This document provides a brief outline of these various activities. I hope that this summary provides some clarity about the process, and a view of how these seemingly independent efforts are, in fact, the first components of a broader strategic effort to define our future as public institutions of higher education.

## **OUR ROOTS**

The UW Colleges and the UW-Extension have many things in common, but their most prominent nexus is rooted in their beginnings. Both institutions started as outreach arms of the University of Wisconsin (now UW-Madison), enabling the university to become the state’s land-grant university.

One cannot understand or appreciate UW-Extension, which has Cooperative Extension as its foundation, without first understanding the history of the University of Wisconsin and the history of the land-grant movement in the United States. Likewise, one cannot understand the UW Colleges without understanding the concept of broad access to higher education, which was at the core of the movement in the mid-1800s to create a different set of American universities—universities whose purpose was not to just educate the aristocracy, but to educate common

people and produce applied research in agriculture, science, and engineering to help America prosper.

The concepts of extension and access, then, are what bind us together today as the only two statewide institutions within the UW System. We should not take these principles lightly, for they were a prominent part of the discussions that gave rise to the founding of the University of Wisconsin in 1848. In 1895, a short course was established and funded by the regents and the legislature to provide “farmer institutes,” representing that first step toward taking the university to the people that has resulted in the two vibrant statewide institutions we have today: the UW Colleges and UW-Extension.

After decades of each of these institutions being led by its own chancellor, UW System President Kevin Reilly, sensing the mission-related connections between the two institutions and looking for ways to increase administrative efficiency in the wake of successive budget cuts, announced, with approval of the regents, that these institutions would integrate their Madison-based administrative operations and be led by a single chancellor.

In making this announcement to the regents in January 2005, President Reilly noted that:

- Several of the UW Colleges were part of UW-Extension until the 1960s and that some administrative services, including personnel, payroll, and benefits, have been shared between the institutions;
- Both UW Colleges and UW-Extension are statewide educational networks operating at geographically dispersed locations, with central administrative offices headquartered in Madison;
- Both are key public gateways for Wisconsin citizens to access higher education; and
- Both have longstanding partnerships with county and local governments.

President Reilly’s proposal called for 1) recruitment of a single chancellor to serve as chief administrative officer of the UW Colleges and UW-Extension, 2) consolidation of administrative services, and 3) continuation of studies to identify additional means of achieving operating efficiencies in a manner that will most effectively preserve and enhance the missions of both institutions.

The purpose of this administrative consolidation was to achieve administrative efficiencies and savings and to strengthen the service capacity of both institutions to their local communities and to the state as a whole. Although the regents’ initial action did not officially call for a complete merger of the two institutions, President Reilly and the board did encourage us to be bold and creative in our efforts to find new ways to deliver value to our students and clients while demonstrating efficiency and accountability to our funders.

President Reilly noted that the recommendation followed a four-month study conducted by consultant David J. Ward, which included consultation with faculty, staff, and administrative leadership of the two institutions. Subsequent conversations included faculty and academic staff

governance leaders of the two institutions, the UW System Faculty representatives, and the executive director and president of the Wisconsin Counties Association.

President Reilly observed that, with the right approach, administrative savings could be achieved while preserving and enhancing quality and access. In that regard, President Reilly and the regents acknowledged that concerns over potential loss of identity or diminished service to clients would need to be carefully addressed, using input from internal and external stakeholders throughout the process.

## **THE INTEGRATION PROCESS, FEBRUARY 2005 – APRIL 2006**

With a goal of demonstrating the UW System's strong commitment to quality, access, efficiency, and effectiveness, UW Colleges Interim Chancellor Margaret Cleek and UW-Extension Interim Chancellor Marv Van Kekerix assembled an Administrative Integration Steering Committee to provide broad leadership for this very complex change process. The committee worked to:

- Identify, select, and guide multiple work teams responsible for assessing specific Madison-based administrative functions/units and options for integration;
- Recruit a qualified organizational development consultant to provide objective guidance for the integration process;
- Promote collegial dialogue across the two institutions to advance support for the administrative integration;
- Establish processes that allow for broad input from faculty, staff, and external stakeholders;
- Provide the new UW Colleges/UW-Extension chancellor with a thorough analysis of strategies for increasing administrative efficiency while maintaining the quality and integrity of educational programs services in both institutions;
- Monitor and prioritize resource requirements associated with the integration process; and
- Assess and resolve emerging issues, working closely with UW System leadership to approve any significant changes to the process.

Over the subsequent 15 months, that committee formed various subgroups to look at areas where the two institutions could collaborate, share resources, and move closer to realizing the goal of the integration process espoused by the president: to become a more efficient institution. In addition to many other achievements, that work resulted in the integration of two UW Colleges and UW-Extension units – information technology and the diversity and workforce equity function.

Additional information about this committee's work can be found at [www.uwex.uwc.edu/chancellor/integration](http://www.uwex.uwc.edu/chancellor/integration).

## **THE TRANSITION TEAM AND ITS REPORT**

When I was appointed as your chancellor, I recognized that I needed to set in motion immediately a process that would elicit widespread input from internal and external stakeholders as we moved our two mission-related institutions along the path of administrative and, possibly, some programmatic integration.

I consulted with numerous governance groups across the two institutions to offer suggestions for Transition Team membership. Those consultations resulted in my appointing a 23-member transition team (which included equal representation from each institution). I worked with the team to structure a process for gathering input from constituent groups across both institutions and to identify important issues we would need to address early in my administration.

The Transition Team enthusiastically embraced this work and issued its report to me on May 1, 2006—my first day on the job. (The final report is available at <http://www.uwex.uwc.edu/chancellor/reports/>.)

## **THE PROCESS GOING FORWARD**

### **A. Our Goals**

Given the access mission of both institutions, I see four major goals of this integration process.

1. Remain true to our historical missions of access;
2. Create an effective and efficient integrated administrative structure in Madison that supports our broad statewide networks and enables the two institutions to carry out their missions in exemplary fashion;
3. Identify current and emerging programmatic opportunities that currently exist where both institutions, given their relative strengths and given the needs of the state, could work more closely together and in concert with other stakeholders to address them; and
4. Identify ways to continually be agile and innovative institutions, always bringing the best research-based education and instructional methods to our students, communities, and stakeholders.

### **B. Our Commitment**

As we move to realize these four goals, our commitment is to serve the identified needs of Wisconsin people. This is our sole mission. Everything we do will be done with this in mind. We

will continue to provide instruction to our students and evidence-based applied research to the citizens of this state at the highest level of quality.

Both the UW Colleges and the UW-Extension have strong traditions of working with community partners to elevate the quality of living across our state. Our commitment is to build upon these traditions so that our institutions will be the best in the world at carrying out our missions. Our institutions will only stay strong if our communities across Wisconsin are vibrant and strong, and our commitment is to ensure that this is the case.

## **GETTING THERE**

### **A. Focus Groups and Listening Sessions**

To accomplish our goals, we will need a shared vision. Creating a shared vision will involve innumerable individuals and partners, both internal and external to our institutions.

The Transition Team recommended that a series of focus groups be held around the state to elicit feedback from a wide variety of external stakeholders. These conversations began this summer. The groups focus on our students' and clients' perceptions and feelings, and elicit feedback about what we are doing well and what needs we might examine more closely as we move forward.

The first focus group conversation, held July 27 at the Pyle Center in Madison, concentrated on the topic of Broadcasting and Media. Participants included a diverse group of volunteers, donors, viewers, and listeners from Wisconsin Public Radio and Wisconsin Public Television. All of the people who had agreed to participate were in attendance and offered very thoughtful and candid remarks. I was truly encouraged by the conversation.

When the Transition Team began to identify all of the potential students, clients, and other stakeholders into discrete groups who might be invited to focus groups, several dozen such groups were quickly identified. Although such a stratified approach would be the most scientifically rigorous approach, the Transition Team recognized the impracticality of scheduling so many sessions in such a short time period. Instead, several major "themes," where multiple stakeholder groups might have common interests in the work of UW Colleges and UW-Extension, were identified.

By design, all the focus groups are being led by a trained facilitator who is not affiliated with either the Colleges or Extension. The topics remaining for focus group conversations, (along with dates and places, if known) are listed below:

<b>Date</b>	<b>Location</b>	<b>Group 1 Topic</b>	<b>Group 2 Topic</b>
-------------	-----------------	----------------------	----------------------

July 27, 2006	The Pyle Center, Madison	Broadcasting and Media	n/a
August 24, 2006	Hayward	Serving Diverse Audiences	Health and the Environment
September 14, 2006	Eau Claire	Agriculture	Community, Economic and Workforce Development
October 2, 2006	UW-Rock County	Student Access	Youth and K-12 Education
October 3, 2006	UW-Marathon	Student Access	Youth and K-12 Education
October 4, 2006	Milwaukee	Serving Diverse Audiences	Community, Economic and Workforce Development
October 16, 2006	UW-Fox Valley	Community, Economic and Workforce Development	n/a
TBA (October)	Madison	Serving Diverse Audiences	n/a
TBA (October)	UW-Washington County	Agriculture	Health and the Environment

As we engage in these rich discussions with students, clients, and external stakeholders, it is equally important for us to hear the voices of internal stakeholders, which include faculty, staff, administrators, and our established governance and advisory groups in both institutions. With this in mind, I will take advantage of numerous meetings already on my calendar over the next few months to elicit that feedback.

Internal discussions might include meetings with the following groups:

- Deans and directors
- Academic department chairs
- Faculty and academic staff governance groups
- Advisory groups (e.g., Systemwide Extension Council, Diversity Council)
- Boards of visitors, foundation boards and friends groups
- Retirees
- Cooperative Extension Administrative Committee
- Continuing Education Executive Committee
- Other groups, to be determined

Unlike the focus group conversations, these internal listening sessions will have a less structured conversational format and will be led by me. As with the focus groups, we will take careful notes

at each of these meetings and analyze those records later to look for common threads and recurring themes. I have asked for a report on the findings by December 2006.

## **B. Administrative Integration Steering Committee**

I have reconvened the Administrative Integration Steering Committee and given it a renewed charge: to continue the work it was initially impaneled to do. Work is proceeding now to integrate the human resources and administrative services functions. Later, the group will look at communications and marketing functions, sometime in 2007.

I have also held a number of conversations with the UW-Extension Faculty Senate, Academic Council, University Committee, and the leadership of the Colleges Senate regarding my support for these groups to begin dialogue on a shared governance model across the institutions. All groups have been receptive to my offering this support and are planning to begin those conversations shortly. Provosts Margaret Cleek and Marv Van Kekerix will work with them as these discussions move along.

In addition, our two provosts are taking the lead to design an inclusive process to begin exploring joint programmatic collaborations across our two institutions. I fully expect that Marv and Margaret will engage in a collaborative, open dialogue in which all voices will be heard.

As we move ahead with these integration-related activities, it is my clear intent that academic units within UW Colleges and UW-Extension retain their core missions and preserve the integrity of their educational programming. Likewise, I expect these units to maintain the integrity of their operating budgets, diverse funding streams and external partnerships that provide the financial underpinnings of our work. As we seek out opportunities for efficiency and synergy, we will not sacrifice effectiveness and long-term success.

In all of the above areas, save communications and marketing, I am asking for a progress report no later than mid-December 2006. For more information on the Steering Committee, see [www.uwex.uwc.edu/chancellor/integration](http://www.uwex.uwc.edu/chancellor/integration)

## **C. Commission on Enhancing the Mission of the UW Colleges**

You will soon read about my forming a commission to help us determine how we might improve upon the access mission of the UW Colleges, and how we might strengthen the mission and reach of both the UW Colleges and UW-Extension through this integration process. The former question, however, will be the primary question the commission will be asked to address. This will be a 20-member commission, with a little over half of the membership coming from outside the institutions.

This commission will be co-chaired by John Torinus, chairman and CEO of Serigraph (former member of the UW Colleges Board of Visitors from West Bend), and Roger Axtell (former member of the UW System Board of Regents from Janesville). The commission is also being asked to complete its work by December 2006.

## **D. Organizational Structure**

The Administrative Integration Steering Committee examined numerous models for organizational structure. When it took a recess from its work in late March 2006, it had arrived at a model that carries the label “Model 9.” While the committee did not recommend Model 9 as the optimum model, this model does represent the latest thinking of the committee. (See Model 9 at [www.uwex.uwc.edu/chancellor/integration/background](http://www.uwex.uwc.edu/chancellor/integration/background).)

I have indicated in several public fora that about 80 percent of Model 9 meets our needs, and I intend to build on it. As I do that, I will share a draft of my thinking with you through governance groups and other structured conversations within and across our two institutions. As part of that process, we will distribute new versions of this organizational model widely and invite your honest feedback. I intend to have the draft model ready for your review by the end of the calendar year, followed by an open period for commentary and discussion. Only after this extensive consultative process will we consider implementing significant organizational changes at the top levels of our institutions.

## **E. Town Hall Meetings**

Toward the beginning of 2007, our intent is to sponsor two or three “town hall” meetings, where we will engage in some “triangulation of the data” generated by the focus groups, the Administration Integration Steering Committee, and the Commission on Enhancing the Mission of the UW Colleges. We expect that by that point along the road toward our shared institutional vision a number of themes will have emerged. These town hall meetings, including at least one comprised of internal colleagues, will provide a venue for sharpening the focus on these themes and testing some of our initial ideas.

## **F. Articulating the Vision (The Big Picture)**

Plans are being made for me to publicly articulate our shared vision in mid-spring 2007. The Transition Team has recommended several possible locations, and we are moving ahead with plans for an event in Wausau in Marathon County, a geographically central part of the state where there is both a UW Colleges and UW-Extension presence.

The term “shared vision” is meant to be a label for a broad set of statements that will set us on the road to a brighter future. I do not expect this to be an operational plan that will dictate specific programmatic, fiscal, or personnel changes. Rather, it will serve as the prominent landmark on our institutional horizon. To paraphrase Steven Covey, this shared vision will not direct the precise manner in which we cut through the forest, but simply serve as the mechanism for ensuring that we’re in the right forest in the first place.

It is important to remember that this vision, whatever it may be, will be your vision. It will be a shared vision, and I invite you to become a part of the conversation and dialogue as we head toward Wausau.

Our two institutions are the embodiment of the Wisconsin Idea. Their histories are rooted in one of service, access, and high quality. Our challenge is to create an intersection, a crossroad, if you will, of common ground to enable us to grow stronger together to better meet the needs of the state's citizens.